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Iberian Peninsula (Spain and Portugal)

Retail Food Sector

Annual

2005

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U.S. Embassy

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Report Highlights:
Spain and Portugal´s retail food sector is robust, with demand for new, high-quality food products growing every year. But, because of the market access requirements imposed as a result of European Commission legislation, the best product prospects on the Iberian Peninsula market for U.S. exporters continue to be primary ingredients such as fishery products, tree nuts, and pulses. (MG24LJ10SH4)

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Madrid [SP1]
[PO]

INDEX

I. MARKET SUMMARY

SPAIN

A. Economic Trends

ECONOMIC TRENDS	2001	2002	2003	2004	2005^	2006*
Inflation (%)	2.7	4.1	2.6	3.2	3.1	3.2
Unemployment (%)	13.1	12.4	11.7	11.0	10.4	9.8
GDP at Market Prices (%)	2.6	2.1	2.4	3.1	3.0	3.2
GDP per Capita ($ Million)	19,691	20,227	21,271	23,644	24,547	26,091
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)						
Total Agricultural, Fish and Forestry Products	16,810	18,327	22,284	24,870	32,841	37,665
Total U.S. Agricultural, Fish and Forestry Products	1,128	1,132	1,310	1,301	1,485	1,573
Total Food Products	14,564	15,960	19,433	22,041	29,403	33,957
Total U.S. Food Products	875	899	1,050	1,049	1,232	1,322
Major Competitors:						
EU	8,260	9,121	11,294	13,226	14,258	15,465
France	2,472	2,704	3,357	3,690	4,006	4,300
United Kingdom	1,167	1,178	1,563	1,663	1,799	1,925
Netherlands	1,055	1,173	1,387	1,531	1,646	1,755
Germany	959	1,038	1,299	1,442	1,561	1,678
Other EU	2,607	3,028	3,688	4,900	5,250	5,828
Argentina	976	1,062	1,287	1,410	1,518	1,619
Brazil	656	607	905	1,134	1,203	1,332
Total Fish and Seafood Products	3,658	3,763	4,620	4,790	5,383	5,779
Total U.S. Fish and Seafood Products	71	62	80	83	88	93
Major Competitors:						
EU	1,383	1,561	1,807	2,005	2,292	2,503
France	278	307	394	419	499	553
United Kingdom	215	241	277	295	335	361
Netherlands	207	232	244	291	316	341
Denmark	160	177	217	225	262	286
Other EU	523	604	675	775	880	964
Morocco	281	314	370	374	429	461
Argentina	408	306	445	356	372	371

^ Estimates
* Forecasts
(1) GTA

B. Retail Trends

	2001	2002	2003	2004	2005^	2006*
RETAIL SECTOR						
No. of Retail Stores	62,047	59,076	56,913	54,255	51,962	49,726
Total Retail Sales ($ Million)	54,561	59,159	61,829	66,134	70,401	74,914
Retail Sales Share by Type of Store (%)						
Hypermarkets	18.3	17.5	17.6	17.4	17	16
Supermarkets	42.2	42.3	42.4	43.8	45	46
Traditional Stores	31.3	30.8	30.1	29.8	28	27
Others	8.2	9.4	9.9	9.0	10	10

Source: Sector Magazines
^ Estimates
* Forecasts

C. Retail Outlets – Company Profiles

Retail Organizations and Outlet Types	Ownership (Local or Foreign)	Sales 2004 $ Million	Number of Outlets	Location	Type of Purchasing Agent
CARREFOUR	French	14,783		Nationwide	Importer,
Hypermarkets		10,644	314		Direct
Puntocash, S.A., Super		210	N/A		
Dia, S.A., Hard Discount		3,929	1,838		
MERCADONA, S.A.	Spanish	9,932	862	Nationwide	Importer,
Supermarkets					Direct
GRUPO EROSKI	Spanish	6,216	718	Nationwide	Importer,
Hyper & Supermarkets					Direct
EL CORTE INGLES	Spanish			Nationwide	Importer,
Hipercor, S.A., Hyper		4,049	32		Direct
El Corte Ingles, Super		829	43		
Supercor, S.A., Super		348	50		
AUCHAN	Spanish/French			Nationwide	Importer,
Alcampo, S.A., Hyper		3,780	45		Direct
Sabeco, S.A., Hyper & Super		1,116	122		
CAPRABO	Spanish	3,139	576	Nationwide	Importer,
Hyper & Super					Direct
Dinosol Supermercados, S.L.	Spanish	2,434	548	Nationwide	Importer,
Supermarket					Direct
LIDL	Spanish/German	1,890	371	Nationwide	Importer,
Hard Discount					Direct

Source: Sector Magazines

D. Convenience Stores – Company Profiles

Retail Organizations and Outlet Types	Ownership (Local or Foreign	Sales 2004 $ Million	Number of Outlets	Location	Type of Purchasing Agent
REPSOL Gas station	Spanish	N/A	2,730	Nationwide	Importer, Wholeseler
CEPSA Gas station	Spanish	N/A	739	Nationwide	Importer, Wholeseler
BPOil ESPANA, S.A. Gas station	UK	N/A	605	Nationwide	Importer, Wholeseler
DISA-SHELL Gas station	Spanish	N/A	467	Nationwide	Importer, Wholeseler
AGIP ESPANA, S.A. Gas station	Spanish	N/A	259	Nationwide	Importer, Wholeseler
GALP ENERGIA ESPANA, S.A. Gas station	Portuguese	N/A	211	Nationwide	Importer, Wholeseler
EL CORTE INGLES Urban Convenience Store	Spanish	348	108	Nationwide	Importer, Wholeseler
GESPEVESA Gas station	Spanish	73	29	Nationwide	Importer, Wholeseler

Source: Sector Magazines

Portugal

A. Economic Trends

	2001	2002	2003	2004	2005^	2006*
ECONOMIC TRENDS						
Inflation (%)	4.4	3.6	3.3	2.4	2.2	2.2
Unemployment (%)	4.1	5.1	6.4	6.7	7.2	7.6
GDP at Market Prices (%)	1.8	0.5	-1.2	0.8	0.5	0.5
GDP per Capita ($ Million)	17,886	18,434	18,311	18,641	18,862	19,084
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)						
Total Agricultural, Fish and Forestry Products	5,495	5,704	6,677	7,467	7,799	8,056
Total U.S. Agricultural, Fish and Forestry Products	244	275	292	289	335	338
Total Food Products	4,699	4,927	5,874	6,558	6,914	6,995
Total U.S. Food Products	202	233	241	234	256	268
Major Competitors:						
EU	3,281	3,498	4,331	4,805	5,158	5,229
Spain	1,733	1,778	2,307	2,468	2,666	2,701
France	592	576	679	728	750	756
Germany	264	291	341	394	418	424
Netherlands	177	239	306	375	435	446
Other EU	515	613	699	840	903	918
Brazil	200	203	239	365	362	369
Argentina	139	130	176	173	186	187
Total Fish and Seafood Products	913	921	1,065	1,183	1,278	1,350
Total U.S. Fish and Seafood Products	36	27	28	41	37	38
Major Competitors:						
EU	464	536	689	797	1,087	1,087
Spain	307	325	444	455	598	598
Sweden	12	22	34	90	151	223
Denmark	43	67	62	77	102	102
Netherlands	28	36	48	66	103	103
Other EU	74	86	101	109	138	138
Russia	65	61	83	101	126	146
Norway	107	89	57	56	58	58

^ Estimates
* Forecasts
(1) GTA

B. Retail Trends

	2001	2002	2003	2004	2005^	2006*
RETAIL SECTOR						
No. of Retail Stores	27,163	25,995	25,454	24,918	23,456	23,130
Total Retail Sales ($ Million)	11,287	12,001	12,538	13,017	13,720	14,382
Retail Sales Share by Type of Store (%)						
Hypermarkets	35.4	34.7	34.3	32.6	32	31
Supermarkets	46.8	48.6	49.5	51.5	53	55
Self-Service	6.5	6.6	7.1	7.3	7.6	8.0
Food Shops	0.9	0.8	0.7	0.6	0.5	0.5
Grocery Stores	10.4	9.3	8.4	8.0	7.2	6.6

Source: Sector Magazines
^ Estimates
* Forecasts

C. Retail Outlets – Company Profiles

Retail Organizations and Outlet Types	Ownership (Local or Foreign)	Sales 2004 $ Million	Number of Outlets	Location	Type of Purchasing Agent
SONAE Continente, Hyper Modelo, Hyper & Super Bonjour, Super	Portuguese	2,712	 15 65 26	Nationwide	Importer, Direct
J. MARTINS Pingo Doce, Super Feira Nova, Hyper	Portuguese/ Dutch	2,128	 190 29	Nationwide	Importer, Direct
Intermarché/Ecomarché Supermarkets	Portuguese/ Belgium	1,665	168	Nationwide	Importer, Direct, Distributor
AUCHAN Jumbo, Hyper Pão Açúcar, Super	Portuguese/ French	1,326	 15 2	Nationwide	Importer, Direct, Distributor
LIDL Hard Discount	Portuguese/ German	1,098	146	Nationwide	Importer, Direct, Distributor
Dia/Minipreço Hard Discount	Portuguese/ Spanish	776	341	Lisbon and Porto	Importer, Direct, Distributor
Carrefour Hypermarket	French	617	7	Lisbon and Porto	Importer, Direct, Distributor
El Corte Inglês Supermarket	Spanish	335	2	Lisbon	Importer, Direct, Distributor
PLUS Hard Discount	Portuguese/ German	N/A	28	Nationwide	Importer, Direct, Distributor

Source: Sector Magazines

D. Convenience Stores – Company Profiles

Retail Organizations and Outlet Types	Ownership (Local or Foreign)	Sales 2003 $ Million	Number of Outlets	Location	Type of Purchasing Agent
SONAE/GALP ENERGIA M24	Portuguese	N/A	84	Nationwide	Importer, Wholeseler
GALP ENERGIA Lojas Tangerina	Portuguese	N/A	36	Nationwide	Importer, Wholeseler
REPSOL	Spanish	N/A	140	Nationwide	Importer, Wholeseler
BP-Shop	Portuguese/UK	N/A	150	Nationwide	Importer, Wholeseler
GCT Maxi&Mini Grulas **Discount Stores**	Portuguese	415	790	Nationwide	Importer, Direct

Source: Sector Magazines

The Iberian Peninsula (IP) retail food market is diversified. Hypermarkets/supermarkets (60 percent of total food sales), convenience stores, major discount stores and specialized stores coexist with the traditional corner grocery stores and open-air markets, even though the total number of retail outlets has decreased significantly in the last decade. There is increasing competition in the scope and range of product offerings, including ready-to-eat and/or ready-to-cook foods, take away meals, and home delivery and the prices and services retailers offer consumers.

IP consumers are willing to experiment with new tastes and products even though the Mediterranean Diet remains the traditional IP diet. IP consumers are constantly presented new food product choices that trend towards more novelties and specialities, more "natural" and delicatessen foods, more prepared and ready to eat products favoring convenience. Consumers are also increasingly responding to high-quality foods in attractive packaging.

Advertising, personal foreign travel, foreign visitors, and immigrants to the Iberian Peninsula, are important factors that expose IP consumers to fashionable trends, new products, and new consumption habits. Ethnic foods, in particular, from Latin American and Eastern European sources, continue to do well with consumers.

In addition, Iberian Peninsula consumers are health conscious. Problems or potential problems concerning food safety are widely publicized and usually receive immediate attention from government agencies.

Consumers purchase the traditional and new-to-market foods at neighborhood supermarkets and traditional fresh product outlets, particularly bread, fruit, seafood or meat products. They generally venture to hypermarkets weekly or monthly to buy non-perishable products. As a result of this purchase pattern, the number of medium-sized supermarkets is growing.

Large food distribution groups continue to open more medium-sized supermarkets. However, the main factors affecting consumer decision to elect where to purchase food products are:

- Proximity;
- Quality;
- Price (excluding sale promotions);
- Variety of products offered;
- Attention given to the client;
- Sale promotions;
- Variety of brands;
- Quick purchasing;
- Parking;
- Operating hours.

U.S. processed food exporters now face even greater challenges in the IP market, because of the new EC labeling and traceability regulations. Any product that contains genetically modified ingredients must be labeled so that the consumer can distinguish the product. Because, IP consumers don't yet have familiarity with genetically modified foods, retailers are reluctant to purchase these processed products or food ingredients for processing.

In addition, acceptable colorings and additives may differ from those used to produce product for the U.S. market. Bixin, for instance, cannot exceed 15mg/k in product destined for the IP market. However, bixin levels are not regularly tested in the United States (some exporters have said they can't even find a lab to test for bixin levels).

Spain and Portugal generally apply EC rules and regulations. However, there are subtleties that you should learn about if you are thinking of exporting to the IP market. For more information, we invite potential U.S. exporters to contact us for additional, unpublished sector-specific information.

In general terms, U.S. exporters already exporting to other EU Members will likely be meeting most of the requirements for exporting into the IP. The U.S. exporter needs to make contact with an IP importer and/or distributor for his product. Typically, food products are imported by an importer, broker and/or wholesaler or distributor.

The following documents are required for ocean or air cargo shipments of foodstuffs to Spain and Portugal:

Bill of Lading and/or Airway Bill

Commercial Invoice

Phytosanitary Certificate and/or Health Certificate when applicable

If your product is or contains plant or animal products, it will require a phytosanitary certificate issued by the competent U.S. authority. Also, if you are exporting animal products, your plant has to be approved to export into the EU.

Import Certificate

Most food products require an Import Certificate issued by the competent Portuguese authority. However, the Import Certificate is obtained by the Portuguese importer and/or the agent involved in the business and is intended for tariff classification purposes.

For more information on import and inspection procedures please see SP5020 at http://www.fas.usda.gov/gainfiles/200507/146130239.doc and PO5014 at http://www.fas.usda.gov/gainfiles/200507/146130240.doc.

These reports should be read in conjunction with the equivalent report done by the FAS Office in the U.S. Mission to the European Commission (USEU), E34054 at http://www.fas.usda.gov/gainfiles/200408/146107373.doc.

Also, please check the U.S. Mission to the European Union webpage at http://www.useu.be/agri/expguide.html, which will guide you on exporting into the EU.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN THE IBERIAN PENINSULA

Advantages	Challenges
Reduced fish catch from European waters while consumer demand for fish and fish products remains strong.	EU labeling, traceability, and packaging laws and a reluctance to purchase products containing genetically modified ingredients.
Access to the IP market through multinational chains like Carrefour, Auchan and El Corte Ingles.	Importers still have limited knowledge regarding the quality and supplies of U.S. food and agricultural products.
Food products in the market are becoming more diversified.	Competition from neighboring EU countries, where tastes and traditional products may be well known.
Overall sales of consumer-ready food products continue to expand.	U.S. exports face higher transportation costs and difficulties in shipping mixed or smaller container loads.
Good network of agents and importers to help get product into the market.	Supermarkets and hypermarkets shelf space is extremely expensive.
Consumers are more health conscious, and tastes are becoming more diversified.	High marketing costs (advertising, discounts, etc.) are necessary.
Greater disposable income and an impulse to buy makes the IP market interesting.	Importers prefer to take delivery on short notice to avoid storage charges.

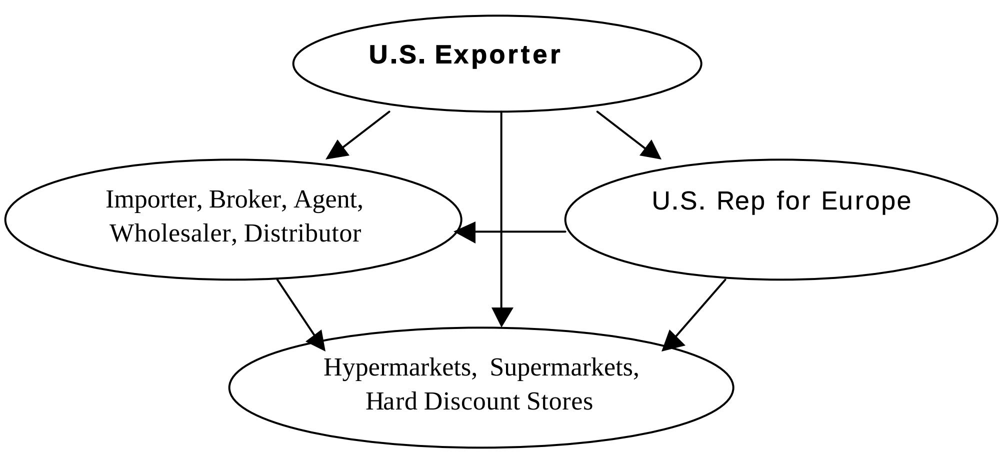
II. ROAD MAP FOR MARKET ENTRY

A. Hypermarket, Supermarkets and Hard Discount Stores

Entry Strategy

Success in introducing products in the Iberian Peninsula market requires local representation and personal contact. A local representative can provide up-to-date market intelligence, guidance on business practices and trade related laws, sales contact with existing and potential buyers, and market development expertise. The Offices of Agricultural Affairs in Madrid and Lisbon maintain listings of potential importers and are developing sector-specific information to help you introduce your product in the IP market (please note that this “Entry Strategy” section applies to all of the sectors noted below).

Market Structure



- Products are imported either by an importer, broker or agent, a wholesaler and/or distributor.
- Some products enter via other European Union ports either through an European importer or through the U.S. representative for Europe for that particular product.
- Product representatives are better positioned to promote to retailers and consumers since retailers, as a general rule, do not promote specific products within their facilities. Retailers will, however, sell shelf-space, which is very expensive in the Iberian market.
- In order to cut costs, some retailers are importing directly from the supplier. In the case of retailers whose ownership is primarily foreign (foreign partnership) such us Carrefour (French), Auchan (French) and Lidl (German) many of the products, in particular specialty products for sale, are from their respective home country.
- Importers are distinctly separated into dry goods, refrigerated items, and produce.
- All distributors have nationwide distribution in both Spain and Portugal.

While hypermarkets and larger sized supermarkets control a majority of sales, small sized supermarkets are becoming evermore popular due to their proximity to the consumer (generally located within walking distance of residential and/or business areas). The costumer fidelity concept has been introduced by hyper and supermarkets, shopping centers and department stores as, well as very specialized outlets in an attempt to make a visit worthwhile for the potential consumer. Direct marketing by mail order, telephone, TV or e-commerce is growing considerably.

Major discount chain stores are also becoming increasingly popular in the Iberian Peninsula, with a steady flow of DIA and LIDL openings. They are much smaller than hypermarkets and only sell food and cleaning products. This type of store provides little service to the consumer, which is reflected in the lower final product prices.

B. Convenience Stores and Discount Stores

Market Structure

Convenience Stores

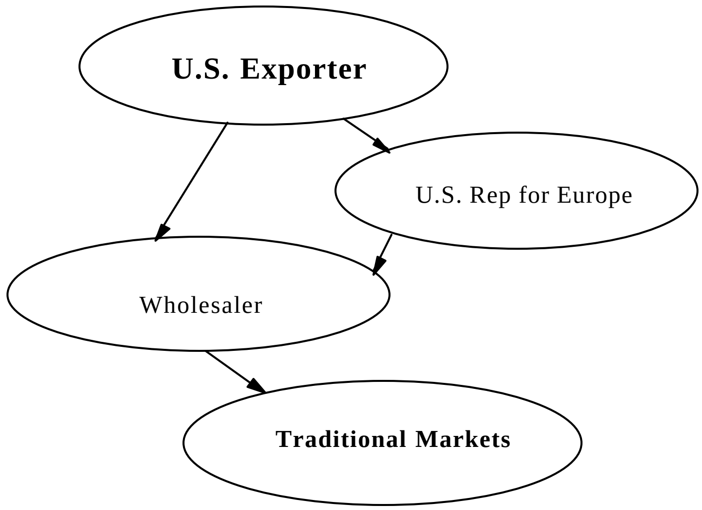
- In the Iberian Peninsula, convenience stores are usually associated with a gas station (90 percent of the total market share). However, "urban" convenience stores are popping up in Spain and Portugal (10 percent of the total market share).
- In Spain, convenience stores are visited, on a regular basis, by ten million consumers: 48 percent visit the store coming directly from their homes and 37 percent visit the store after leaving their work place.
- Convenience stores are very popular for last minute purchases.
- Advantages pointed out by convenience store consumers include their opening hours (continuously 24 hours opening). However, price is pointed out as the main disadvantage.
- Suppliers to convenience stores also supply hyper and supermarkets.
- As convenience stores generally have insufficient storage space to import directly, they almost always buy their products from importers, wholesaler and/or distributors.

Discount Stores

In Portugal, most discount stores were once family-owned small to medium-size groceries, which retained the same model of management when they converted to discount stores. These stores became associates of wholesalers or cooperatives that provide them with the supporting structure similar to a large-scale chain, as well as competitive prices in order to face the strong competition of the hyper and supermarkets. Being associated with one of the above organizations means that they receive training in management techniques and also some equipment in order to modernize the store. While ownership is retained, they are obligated to buy products from the supplying wholesaler or cooperative. Their insignia identifies these stores with the wholesaler or cooperative with whom they are associated. Since they are supplied by these large wholesalers and cooperatives, the prices they offer for their products are quite competitive compared to those of regular groceries. They also participate in promotions conducted by the organizations. Prices are still higher than those of the hyper and supermarkets but these stores are quite popular within residential areas as well as in rural areas. The fact that they sell fresh produce attracts many consumers. For the store owner, it is advantageous to be an associate as purchasing and acquisition is much simpler.

C. Traditional Markets

Market Structure



- Traditional markets are composed of corner grocery stores, fresh and regional markets.
- Wholesalers are the main suppliers for traditional markets.
- Large wholesalers do import directly but smaller wholesalers, whose main customer is the traditional market, do not import and get the product through other local importers and/or larger wholesalers.
- Traditional markets also buy directly from local producers or cooperatives in rural areas.

Traditional corner grocery stores are usually family owned and located within residential and/or neighborhood areas. Although they are small in size, they usually carry a diversified range of food and cleaning products. Sanitary conditions are good and all of them have a small refrigeration area. Although their prices are usually higher than in any other type of outlet, they are quite popular for their fresh produce and its proximity. Because these stores are part of the neighborhood, some of them deliver products ordered by telephone. Their main suppliers are the cash-and-carries, which are warehouse type supermarkets and/or small wholesalers who visit once a month to take inventory and restock.

Open-air markets are also very popular. They sell mostly fresh produce, edible dry beans, meat and fish and are only open in the mornings. Their suppliers are the wholesale markets for fresh produce.

Regional open-air markets are also very popular. They take place either once a week, once a month or, in some particular cases, once a year, and usually run on weekends. Because they are so popular and traditional, they are located in the vicinity of major cities and throughout rural areas. Fresh produce and regional foods such as cheese, cookies, etc. are the most common products marketed at these fairs. They also sell clothes, audio and videotapes, portable radios and many other products that are usually found at a flea market.

Of additional interest are some "specialized food stores" – gourmet type stores - which are located in the major cities. These stores specialize in particular food products such us cheese, diversified types of bread, wines, regional products, etc. These stores may be compared to Deli stores and sell not only delicatessen food products but also import some of the products, mainly cheeses and wine. These stores are usually expensive due to the diversity and type of products presented.

IV. BEST PRODUCT PROSPECTS

Tree Nuts
Fish and Seafood, fresh and frozen
Pulses
Snack foods
Speciality foods

V. POST CONTACT AND OTHER INFORMATION

If you have any questions or comments regarding this report or need assistance exporting to Iberian Peninsula, please contact the Office of Agricultural Affairs in Madrid or Lisbon at the following address:

Foreign Agricultural Service
American Embassy, Madrid
PSC 61, Box 20
APO AE 09642
Tel. 34-91 587 2555
Fax: 34-91 587 2556
Email: AgIberia@usda.gov
http://www.embusa.es/

American Embassy, Madrid
C/ Serrano, 75
28006 Madrid
Spain

or

Foreign Agricultural Service
American Embassy, Lisbon
PSC 83, Box FAS
APO AE 09726
Tel. 351-217702358
Fax: 351-217269721
Email: AgIberia@usda.gov
http://www.american-embassy.pt/

American Embassy, Lisbon
Av. Das Forças Armadas
1600-081 Lisbon
Portugal

Please consult our home page for more information on exporting U.S. food products to the Iberian Peninsula, including:

Spain

The Exporter Guide, SP5032 at http://www.fas.usda.gov/gainfiles/200509/146131076.doc;
The HRI Sector, SP4030 at http://www.fas.usda.gov/gainfiles/200412/146118192.doc;
The Food Processing Sector, SP4025 at
http://www.fas.usda.gov/gainfiles/200410/146117871.doc.

Portugal

The Exporter Guide, PO5020 at http://www.fas.usda.gov/gainfiles/200509/146131067.doc;
The HRI Sector, PO4006 at http://www.fas.usda.gov/gainfiles/200407/146106851.doc.

Importer lists are also available from our office to exporters of U.S. food products. A list of trade associations and useful government agencies is provided below:

Spain

Trade Associations

FIAB- Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)

Diego de León, 44
28006 Madrid
Tel: 34 – 91 411 7211
Fax: 34 – 91 411 7344
www.fiab.es
fiab@fiab.es

FEHR – Federación Española de Hostelería
(Spanish Federation for HRIs Sector)
Camino de las Huertas, 18, 1ª
28223 Pozuelo de Alarcón
Tel: 34- 91 352 9156
Fax: 34- 91 352 9026
www.fehr.es
fehr@fehr.es

ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados
(Spanish Association for Distributors and Supermarkets)

Cedaceros, 11, 2 Despacho
28014 Madrid
Tel: 34- 91 429 8956
Fax: 34- 91
www.asedas.es
info@asedas.org

ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución
(National Association of Midsize and Large Distributors)

Velazquez, 24
29006 Madrid
Tel: 34- 91 522 3004
Fax: 34 –91 522 6125
www.anged.es
anged@anged.es

Government Agencies

Imported Foodstuffs, Infections and Compound Residues, Health Certification, Port Inspection and EU Alerts
Subdireccion General de Sanidad Exterior
Ministerio de Sanidad y Consumo
Paseo del Prado, 18 y 20
28014 Madrid
Phone: (34-91) 596-2038
Fax: (34-91) 596-2047
http://www.msc.es/Diseno/informacionProfesional/profesional_sanidad_exterior.htm
E-mail : saniext@msc.es

AGENCIA ESPAÑOLA DE SEGURIDAD ALIMENTARIA (AESA)
Spanish Food Safety Agency
Alcalá, 56
28071 Madrid
Fax: (34-91) 338-0375
http://www.aesa.msc.es/aesa/web/AESA.jsp
E-mail: comunicacionaes@msc.es

Dirección General de la Industria Agroalimentaria y Alimentación
Ministerio de Agricultura, Pesca y Alimentación
Ministry of Agriculture, Fisheries and Food
Paseo de Infanta Isabel, 1
28014 Madrid
Tel: 34-91 347 5361
Fax: 34 – 91 347 5770
http://www.mapya.es/es/alimentacion/alimentacion.htm

Portugal

Trade Associations

APED-Associação Portuguesa de Empresas de Distribuição
(Portuguese Association of Distribution Companies)

Campo Grande, 285-5º
1700-096 Lisboa
Tel: 351-21-751-0920
Fax: 351-21-757-1952
www.aped.pt
ARESP-Associação da Restauração e Similares de Portugal
(Portuguese Associations for HRIs Sector)

Av. Duque d'Avila, 75
1000 Lisboa
Tel. 351-21-352-7060
Fax: 351-21-354-9428
Email: aresp@aresp.pt
www.aresp.pt

FIPA-Federação das Indústrias Portuguesas Agro-Alimentares
(Federation of the Agro-Food Portuguese Industries)

Av. António José de Almeida, 7-2º
1000-042 Lisboa
Tel: 351-21-793-8679
Fax: 351-21-793-8537
Email: info@fipa.pt
www.fipa.pt

Government Agencies

Direcção Geral de Fiscalização e Controlo da Qualidade Alimentar
(General Directorate for Control of Food Quality)
Av. Conde Valbom, 96
1050 LISBOA
Tel. 351-21-798-3600
Fax: 351-21-798-3834
Email: direccao@dgfcqa.min-agricultura.pt
www.dgfcaq.min-agricultura.pt

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